



Ideas... and Stuff!

How to Make the Second Half of 2021 Fantastic.

An idea can come from anywhere. You might be doing everything right, but sometimes a new idea leads to a small tweak that makes everything just click....

Taking your financial practice to the next level is no easy task. It takes a village to get you to where you could be.

Whether it's **finding the right carrier** for your client, creating **the best marketing** campaign for your event or delving out innovative ideas to make you **stand out from the competition**, these are reasons why advisers choose us. ***Because we show up, every day, ready to go.***

At Table Bay its not about us, it's about you...

That's why we're here—to help you succeed.

- **What works for your peers**
- **Permanent changes to business**
- **Stand out from all other financial professionals**
- **Niche prospecting that works**
- **Learn from others, share your ideas**

We are conducting a very special introductory webinar!

Tuesday, May 11th, 2021 at 10am Mountain/9am Pacific

Register Today
goto.tablebay.us/ideas



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What We Have Planned

Strategic Partnerships

- Maximizing strategic partnerships—CPAs, attorneys, Table Bay and ATS—expanding your reach and increasing your client confidence.
- Taking care of tax planning and filing solidifies client relationships.
- Great office management helps make partner relationship seamless.
- Getting referrals from your best clients.

Seminars and Webinars

- Having a solid presentation is imperative.
- The key to success? Practice, practice and more practice...
- Consider a coaching program to up your game.
- From taxes to Medicare, how niche marketing helped excel business in 2020 and continues into 2021.
- You must think outside the box.
- How to generate new leads with niche focus.
- Adding another business line to your practice.

New Marketing Platforms

- Exciting new platforms designed to make you stand out.

Client Centric Marketing

- How catering to your clients socially can make a difference to your bottom dollar.
- Niche audiences pay attention to extra effort on their behalf; think of women's events.
- Allow your clients to get to know you in your element with open houses.
- Allowing clients to use office space for personal reasons.

Opening Back Up to an In-Person World...

- Workshops
- Office Meetings
- New and exciting ways to meet and engage clients
- What the future brings

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